

Creating a Philanthropic Advancement Culture

Presentation to Northern Michigan Community Action Agency
Board of Directors
Thursday, August 20, 2015

Overview

- * Who is Dave Eitland?
- * Prelude
- * Levels of Commitment
- * Again, again, again
- * What can I do?
- * Q & A

Who is Dave Eitland?

- * 30 years of professional philanthropy & giving
- * Partnered with boards to implement vision in social services, higher education, churches, etc.
- * 26 capital campaigns & led major gift programs
- * Worked to 100s of volunteers to make charitable dreams to become reality
- * Staff person, consultant, board member and volunteer
- * Married to Rev. Katheryn King, Grace Episcopal Church, 37 years; daughter, Leah, Phoenix



Loki the Dog



Creating a Giving Culture

- * 98% communication and relationship building
- * 2% solicitation

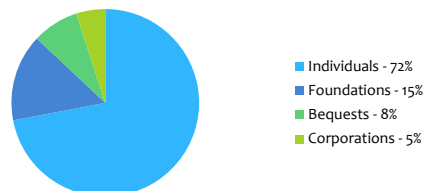
What are we doing to build and maintain a relationship with our key people?

Relationship building is based on communication:
Constant, Consistent, and mission story telling

Friends telling friends is the best

Giving in America \$358,000,000,000 in 2014 (1.7%)

Giving according to Giving USA



How then should we direct our time and resources in building giving?

Prelude to building relationships

- * Make your own commitment first - \$\$\$ & time
- * Become familiar with your reason why you give
- * Tell your story like an ambassador to your world
- * 30 second speech
- * Create arenas to tell others
- * Do it again, again, again, again
- * It's everyone's job to talk about giving



7 levels

- * Identification
- * Information
- * Creating Awareness
- * Understanding
- * Caring
- * Involvement
- * Commitment

Ideas from David Dunlap article "Major Gifts Programs" in a book "Principles and Practices of Fundraising"

Identification: Who?

- * Who should be involved?
- * My friends who think like I do
- * FR universe: Suspects, Prospects, and Donors
- * Suspect to a Prospect = Linkage, Ability, and Interest
- * Do they have a charitable heart?
- * Are they known for large giving?
- * You never know who can give a large gift!!!
- * Identification is everyone's task



Information: Who are they?

- * Donor in the past?
- * What do they give to?
- * What does Google say?
- * What does the Internet say?
- * Who are the people they know?
- * Who is the person they can't say "No" to?
- * Do we have a system to track this information?

Information provides the knowledge to ask the right gift from the right person at the right time.

Awareness: Background



- * Is the charity in community consciousness? Why not?
- * Storytelling in all kinds of media
- * What is the media that the prospect likes to be contacted?
- * Newsletters, events, parties, activities – big & small
- * Informational sessions and parties
- * Press releases, blogs, PSA, Facebook, g+, YouTube
- * Use all platforms
- * Staff driven function but need "on the ground" storytellers

Understanding: Personal

- * Individualized activities and strategies
 - * Thank you calls by board members
 - * Personal letters – hand written?
 - * Individual briefings hosted by board members
 - * Hosting a house party
 - * Call or personalized letter who benefited from the gift
 - * Stewardship = thank you and recognition for giving
 - * 30 second elevator speech from the heart

Caring: Signs that it is happening

- * Actively seeks information
- * Begins to give annually
- * Voluntarily tells stories to friends and peers
- * Wants to get the word out



Involvement

- * Volunteers at single events
- * Attends events regularly
- * Serves on boards, committees, etc.
- * Participates in programs
- * Openly advocates for the organization

Commitment

- * Gives freely of time when asked
- * Gives time for "long haul"
- * Freely provides talent and expertise
- * Makes an annual donation
- * Makes major gifts
- * Grows constantly in giving time, talent, and financial resources

Again and Again and Again

- * Cycle repeats itself to ever increasing commitment to organization
- * ONLY if organization practices good
 - * Thank yous
 - * Stewardship & Recognition
 - * Constant, personal communications
 - * Continue to ask in interest area
 - * Seek advice



Essential for Success

- * Improving relationships
- * Frequent mission focused storytelling to everyone
- * Telling people personally how their donation is used
- * Ask for continued involvement
- * Train them to tell the story
- * Ask for greater financial gifts
- * Repeat, repeat, repeat

Guaranteed Failure

- * Do not communicate to donors
- * Do not ask for involvement
- * Do not keep track of relationship
- * Under staff advancement, don't listen, don't help
- * Under budget
- * Forget the Rumpelstiltskin Syndrome
- * Thinking it is only the advancement person's job
- * Not creating a philanthropic culture where everyone involved

So what can I do?

- * Donate and grow in your financial giving and time commitment
 - * Annually and place a gift in your trust/will
 - * Special major giving when asked
 - * Get more involved as you are able
- * Gain an in-depth knowledge of successes of charity
- * Advocate
- * Tell your 30 second elevator speech to someone each week
- * Host a party
- * Host a tour
- * Invite people to have the same fun you are having
- * Find new people to get involved.



Questions?

